

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Atty McDonald, Jackie (Pro Per – Sister-in-Law – Former Executor)

Atty Kruthers, Heather (for Public Administrator)

Order to Show Cause as to Jackie McDonald for Failure to File the First Account

DOD: 8-19-06			JACKIE MCDONALD, Sister-in-Law, was	NEEDS/PROBLEMS/COMMENTS:
			appointed as Executor with Full IAEA	
			without bond on 10-10-06. Letters issued	
			10-23-06. Ms. McDonald was originally represented by Attorney Roger W.	OFF CALENDAR
Co	nt from 120414	,	Krouskup of Selma, CA.	
01	2215, 030515		Tribusing of contra, of the	Minute Order 3-5-15 states the order to show cause is vacated.
	Aff.Sub.Wit.		Inventory and Appraisal filed 1-17-07	to snow cause is vacatea.
	Verified		indicated a total estate value of	First Account and Report of Executrix
	Inventory		\$333,566.08 consisting of residential real	After Removal filed 3-26-15 by Jackie
	PTC		property in Kingsburg, personal property and cash.	McDonald is set for hearing 5-11-15.
	Not.Cred.		dia casi.	
	Notice of		Three Creditor's Claims were filed	
	Hrg		totaling \$13,646.39.	
	Aff.Mail			
	Aff.Pub.		Pursuant to a Substitution of Attorney filed 4-20-10, Ms. McDonald is now self-	
	Sp.Ntc.		represented.	
	Pers.Serv.		Topicsomed.	
	Conf.		Nothing further was filed in this case until	
	Screen		the Court set status hearing for failure to	
	Letters		file a first account or petition for final	
	Duties/Supp		distribution.	
	Objections		On 1-22-15, the Court removed Ms.	
	Video		McDonald as Executor and appointed	
	Receipt		the PUBLIC ADMINISTRATOR. Minute	
	CI Report		Order states Ms. McDonald is still ordered	
	9202		to file and serve her first account, turn	
	Order		over any and all documents regarding the estate, and to be personally present	
<u> </u>	Aff. Posting		in Court on 3-5-15.	Reviewed by: skc
	Status Rpt			Reviewed on: 4-6-15
	UCCJEA Citation			Updates: Recommendation:
	FTB Notice			
	FIB NOTICE			File 1 - Wright

2 Jesus Gonzalez Rodriguez (GUARD/P)

Case No. 08CEPR00173

Atty Gonzalez, Jesus N. (Pro Per – Father – Petitioner)

Atty

Aguilar, Nellie (for Maria Ibarra – Maternal Grandmother – Guardian)

Petition for Visitation

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Con	t. from 061113	3,		
	013, 091013,	•		
	313, 121313,			
	314, 042114,			
	314,081814,			
	714, 011215, 515, 0022615			
	Aff.Sub.Wit.			
	Verified			
-	Inventory			
	PTC			
	Not.Cred.			
~	Notice of			
	Hrg			
*	Aff.Mail	w/o		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
-	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
_	Order			Paviawad by: ska
	Aff. Posting			Reviewed by: skc Reviewed on: 4-6-15
	Status Rpt UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 2 - Rodriguez
	FID NOTICE			THE Z - KOUNGUEL

Atty

3

Burnside, Leigh W. (for Joseph Kalashian – Conservator/Petitioner)

(1) Fourth Account Current, (2) Report of Conservator and Petition for it's Settlement, and for (3) Allowance of Attorneys' Fees and Costs

		JOSEPH KALASHIAN, Brother and	NEEDS/PROBLEMS/COMMENTS:
-		Conservator of the Person and Estate,	
 		is Petitioner.	1. It appears that there was a change in
 		=	form of assets during the accounting
I⊨		Account period: 08/01/13 - 12/31/14	period. At the beginning of the account
Co	ont. from		period the estate had cash assets of \$70,301.99, but at the end of the
	Aff.Sub.Wit.	Accounting: \$638,941.44	account period, the cash assets were
√	Verified	Beginning POH: \$569,494.82	only \$7,245.84, despite having receipts
	Inventory	Ending POH: \$572,567.62	greater than disbursements. It appears
	PTC	\$7,245.84 is cash	that one account that was cash at the
	Not.Cred.		beginning of the account period was converted to an annuity (non-cash
-	Notice of	Conservator - waived	asset). Pursuant to Probate Code §
	Hrg	Attorney - \$4,558.00	1063(b) - If there were purchases or
	Aff.Mail w/	(3.6 attorney hours @ \$360/hr. and .1	other changes in the form of assets
ŀ	<u> </u>	attorney hours @ \$370/hr. and 18.6	occurring during the period of the
 	Aff.Pub.	paralegal hours @ \$135/hr. and 5.10	account, there shall be a schedule showing these transactions. Need
 	Sp.Ntc.	paralegal hours @ \$140/hr.)	revised accounting reflecting this
	Pers.Serv.		change of form of assets.
	Conf.	Attorney costs - \$435.00	Note: If the petition is granted, status
<u> </u>	Screen	(filing fees)	hearings will be set as follows:
	Letters	0	
	Duties/Supp	Current bond amount of \$135,603.98 is sufficient.	Thursday, October 13, 2016 at 9:00 a.m. in Department 303, for the filing of the
	Objections	is sufficient.	fifth account.
	Video	Petitioner prays for an Order:	Pursuant to Local Rule 7.5 if the required
	Receipt	1. Approving, allowing and	documents are filed 10 days prior the date
	CI Report	settling the Fourth Account;	set the status hearing will come off
√	2620(c)	2. Authorizing the attorney fees	calendar and no appearance will be
✓	Order	and commissions.	required.
	Aff. Posting		Reviewed by: JF
	Status Rpt	1	Reviewed on: 04/06/15
	UCCJEA	1	Updates:
	Citation		Recommendation:
	FTB Notice		File 3 - Kalashian
			3

Atty Wishon, A. Emory (for Executor Diane Esparza)

Atty Roberts, Gregory J. (for Objector Ray A. Esparza)

Regarding Proposed Order Approving First and Final Account and Report of the Status of Administration and Petition for Settlement Thereof; For Allowance of Statutory Attorneys' Compensation and for Final Distribution

D	D. 2/0/22		DIANE COAPTA Developers and Fire automobile	
ВО	D: 3/2/13		DIANE ESPARZA, Daughter and Executor with	NEEDS/PROBLEMS/COMMENTS:
			Limited IAEA without bond, filed her Amended	
			First and Final Account on 8/21/14. The petition	
			requested statutory fees of \$6,252.84 to Petitioner	SEE ADDITIONAL PAGES
			and her attorney, reimbursement of \$13,686.21 to	SEE ADDITIONAL LAGES
	Aff.Sub.Wit.		Petitioner for expenses (less \$10,400.00 for rent), and distribution of the estate to Diane Esparza	
			and Ray Esparza as trustees of the Ray P. and	
	Verified	Х	Virgie Esparza Trust.	
	Inventory		viigie Espaiza 110st.	
	PTC		RAY ESPARZA, Son, filed his Objection on 9/23/14.	
	Not.Cred.			
	Notice of	Х	Dispute Resolution Agreement attached to	
	Hrg		Declaration of A. Emory Wishon, III, in Support of	
	Aff.Mail	Х	Dispute Resolution Agreement filed 2/5/15	
	Aff.Pub.		included a list of specific assets and liabilities,	
	Sp.Ntc.		withdrawal of the objection, and attorney fees to Objector's attorney of \$6,370.00 plus costs of	
	Pers.Serv.		\$1,032.00.	
	Conf.		¥ 1/00=1001	
	Screen		Minute Order 2/10/15 states: The matter is	
	Letters		approved subject to filing of a receipt for the	
	Duties/Supp		\$10,400.00 owed for rent, and with the objector's attorney's fees at \$6,252.84 plus costs of	
	Objections		\$1,032.00. Mr. Wishon to submit a revised order.	
	Video		Petition granted, order to be signed ex parte.	
	Receipt		remon granica, order to be signed ex parte.	
	CI Report		On 2/23/15, Mr. Wishon submitted a revised	
	9202		proposed order, along with a declaration, that	
>	Order		provides revised schedules, fee calculations, and	
	Aff. Posting		distribution.	Reviewed by: skc
	Status Rpt		Because the proposed order did not correspond	Reviewed on: 4-6-15
	UCCJEA		to the petition that was granted on 2/10/15 or	Updates:
	Citation		the Court's minute order, the Court re-set the	Recommendation:
	FTB Notice		matter for hearing, with Petitioner responsible for	File 5 – Esparza
			serving notice on all parties entitled thereto.	
			See Page 2 for a comparison of the petition and	
			the revised schedules attached to the	
			declaration.	
-				

5 Virginia Esparza (Estate)

Case No. 13CEPR00398

Page 2

Amended Petition filed 8-21-14:

Accounting: \$175,094.62 Beginning POH: \$164,061.64

Ending POH: \$175,105.87 (\$54,505.87 cash plus real property, personal property, and rent due

from Executor Diane Esparza of \$10,400.00)

Executor (Statutory): \$6,252.84 (includes the \$10,400 rent due as a "receipt" for calculation)

Attorney (Statutory): \$6,252.84

Reimbursement to Petitioner: \$13,868.21, less \$10,400.00 owed in rent, balance due of \$3,468.21.

Distribution pursuant to Decedent's will: Diane Esparza and Ray A. Esparza, as trustees of the Ray P. and Virgie Esparza Trust dated 11-1-96: \$159,059.08 (not broken down).

Declaration of A. Emory Wishon, III, filed 2-23-15, and Proposed Order provide as follows:

Accounting: \$189,006.92 Beginning POH: \$177,973.94

Ending POH: \$188,995.67 (\$78,795.67 cash plus the residence valued at \$110,000.00 and personal property valued at \$200.00) (Schedule A indicates \$10,400.00 in rent was paid 2-10-15.)

Executor (Statutory): \$6,670.21 (increased based on above revised schedules, which includes cash not previously inventoried, and the \$10,400.00 rent now paid as a receipt)

Attorney Wishon (Statutory): \$6,670.21 plus costs of \$1,439.45.

<u>Note</u>: Costs were not previously requested and do not appear to be itemized in the petition or declaration pursuant to Local Rule 7.17.

Attorney Roberts: \$6,370.00 plus costs of \$1,032.00

<u>Note</u>: Minute Order 2-10-15 authorizes \$6,252.84, which corresponded to the previous statutory compensation) plus costs of \$1,032.00. Declaration filed 2-23-15 states that because the amount originally requested, \$6,370.00, is actually less than the new statutory figure, that is the figure that should be authorized.

Reimbursement to Petitioner: \$11,631.38

Distribution: Real property only. <u>Note</u>: cash and personal property are not mentioned. Order includes two parcels, where only one was inventoried.

SEE ADDITIONAL PAGES

Page 3

NEEDS/PROBLEMS/COMMENTS:

- 1. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to the Court's order of 3-2-15 and Probate Code §1220 on Ray Esparza, Attorney Gregory J. Roberts, and Mandy Esparza.
- 2. On 2-10-15, the Court granted the petition, subject to receipt of the \$10,400.00 owed, and authorized attorney fees and costs to the Objector's attorney in the same amount as the statutory fees that were authorized to Petitioner and her attorney.

However, the proposed order was submitted with revised schedules that now include a previously disputed account, which result in an increase of the statutory fee calculation for Petitioner and her attorney.

- a. The declaration and revised schedules are not verified by the fiduciary Executor.
- b. It does not appear that this increase was contemplated by either the agreement or the Court when granting the petition. Need clarification.

<u>Note</u>: The proposed attorney fees to Objector's attorney were also increased further than what was authorized, but only to the amount noted in the agreement.

- 3. The proposed order now includes costs of \$1,439.45 to Petitioner's attorney, which were not previously requested, and have not been itemized for review pursuant to Local Rule 7.17. Need itemization.
- 4. The proposed order also appears to include a parcel of real property that was not included in the I&A. I&A Partial No. 1 filed 1-3-14 includes the residence, APN 436-113-14, without any legal description. The proposed order includes distribution of the residence, APN 436-113-14, as "Parcel One" plus "Parcel Two" APN 436-113-23. Need clarification: Was Parcel Two included in the Probate Referee's appraisal value OF \$110,000.00?
- 5. The proposed order does not include the dollar amount for distribution in addition to the real property pursuant to Local Rule 7.6.1.A.

6 Teddy Lee Culwell (Estate)

Atty

Case No. 13CEPR01052

Shepard, Jeff S. (for Debra Ann Culwell and Phyllis Lynn Madrigal – Co –Executors – Petitioners)

Petition for Final Distribution and for Allowance of Statutory Attorneys Fees on
Waivers of Accounting and Notice

	D. 00/0//0012		n=		I and DUVILIC IVAIN	NEEDS /DDODLEAS /COAAAENTS:
DOD: 09/26/2013		DEBRA ANN CULWELL and PHYLLIS LYNN MADRIGAL, daughters, appointed Co-			NEEDS/PROBLEMS/COMMENTS:	
					EA without bond on	
			01/23/2014, a	re petit	ioners.	
Cont. from		Accounting is	waive	d		
	Aff.Sub.Wit.		7 10 0 0 0 1 1 1 1 g 10		.	
✓	Verified		I&A POH	- -	\$154,453.47 \$234,932.15 (Cash)	
✓	Inventory					
	PTC		Co-Executors	_	Waive	
✓	Not.Cred.		Attorney	-	\$7,289.07	
✓	Notice of Hrg		(Statutory)			
✓	Aff.Mail	w/o	Closing	-	\$2,500.00 (taxes)	
	Aff.Pub.		Distribution of	ursuant	to decedent's will, is	
	Sp.Ntc.		to:	oisoain	io acccaciii 5 Wiii, is	
	Pers.Serv.					
	Conf. Screen		Debra Ann C	ulwell -	\$112,571.54	
✓	Letters 01/24,	/2014	Phyllis Lynn Mo	adriaal	- \$112.571.54	
	Duties/Supp		, , ,	0 -	, , , , , , , , , , , , , , , , , , , ,	
	Objections					
	Video Receipt					
	CI Report					
1	9202					
✓	Order					
	Aff. Posting					Reviewed by: L∨
	Status Rpt					Reviewed on: 04/07/2015
	UCCJEA					Updates:
	Citation					Recommendation: Submitted
✓	FTB Notice					File 6 - Culwell

6

Rosenbalm, Rochelle (Pro Per Conservator)

Petition for Substituted Judgment [§§ 2580(a)(1) and 2580 (b)(11)]

			ROCHELLE ROSENBALM, Conservator, is	п	EDS/PROBLEMS/COMMENTS:
			Petitioner.		250,1 ROSELINO, COMMENTO.
			Petitioner states: Conservatee Lorraine		
			Keehn drafted and signed the Lorraine	Co	ontinued from 3-5-15
			Keehn Trust in April 1993 and modified	The	e following issues remain:
Co	nt 030515		the trust on 4-5-02. In April 2014, strife		s ronowing issues remain.
	Aff.Sub.Wit.		overcame the family regarding	1.	The settlement agreement referenced
>	Verified		Lorraine, who at that time was 90 years		is not attached to the petition.
	Inventory		old and was living in her home with her	2.	Petitioner does not provide copies of
	PTC		daughter, Linda Courtney. Through	۷.	the trust, the 2002 modification, or the
	Not.Cred.		events that are no longer relevant,		2014 modifications. The Court may
>	Notice of		Lorraine began living with her son,		require this documentation pursuant
	Hrg		Richard Natividad.		to Probate Code §§ 2583(f), 2586.
>	Aff.Mail	W	On 5-2-14, Lorraine signed a new trust	3.	This petition does not provide
	Aff.Pub.		declaration resigning as trustee and	0.	specifics as to what changes are
	Sp.Ntc.		appointing Richard as successor		being made to the trust. The Court
	Pers.Serv.		trustee. Additionally, the distribution of trust assets was dramatically changed,		may require the proposed
	Conf.		providing Richard with 90% and Linda		documentation for review, as it appears the proposed changes do
	Screen		with 10%. Previously, they were to		more than simply nullify the 2014
	Letters		receive equal shares. Lorraine has		modifications.
	Duties/Supp		other children, but they were removed		
	Objections		as beneficiaries under the previous	4.	Need order.
	Video		2002 modification.		
	Receipt		Ultimately, Linda filed the petition for		
	CI Report		conservatorship. Richard objected.		
	9202		Jennifer Walters was ordered to		
		٧.	become Lorraine's court-appointed		
	Order Aff Posting	Х	attorney.	D.	viewed by: skc
	Aff. Posting Status Rpt		One of the major contentions was that		viewed by: SRC viewed on: 4-6-15
	UCCJEA		Lorraine was under duress when she		dates:
	Citation		signed the documents on 5-2-14. After	<u>-</u>	commendation:
	FTB Notice		an initial meeting with Lorraine, Jennifer		e 7A - Keehn
	FID NOTICE		began inquiring whether she meant to change her trust documents. Lorraine	LIIE	F /A - Reelili
			had no recollection of doing so. A		
			declaration filed 6-1-14 by Attorney		
			Justin Campagne, Esq., indicates		
			Lorraine did retain his services and was		
			aware of the changes and was not		
			under duress.		
					
			<u>SEE PAGE 2</u>		
					7.6

7A Lorraine Keehn (CONS/P)

Case No. 14CEPR00474

Page 2

Petitioner states when Lorraine was told this information, she protested to the new provisions naming Richard as agent and trustee, and indicated she wanted Linda and Richard to receive equal shares of her estate. After several hearings, depositions, and discovery regarding Lorraine's care, potential conservator, and trust documents, all parties agreed to a Settlement Agreement. Pursuant to the agreement, Rochelle Rosenbalm, Lorraine's granddaughter-in-law, would become conservator of her person and estate, and Lorraine's trust documents would be modified to allow Richard 60% of the estate and Linda 40% of the estate. This modification was to be secured per this petition.

Lorraine was fully advised by her counsel regarding the settlement. She understood the issues and wished for the children to get along. She indicated she agreed with the 60/40 split to her children and believed this was the best way to resolve the situation. Petitioner states Lorraine was never found to be incompetent or suffer from any mental incapacity; rather, it was found that she needed assistance and was in favor of Ms. Rosenbalm as her conservator.

Based on the facts set forth above and pursuant to Probate Code §2580(a)(1) and (b)(11), Petitioner requests to modify the revocable trust documents to express the estate distribution pursuant to the settlement agreement. No additional changes are requested.

Petitioner states this request benefits Lorraine as she does not wish for the current trust distribution to remain in effect and wishes for it to be changed. Additionally, this allows Lorraine to exercise her right in modifying the revocable trust as she has not been found to be mentally incapacitated or unable to understand the request that is being made.

Petitioner requests that this Court order that Conservator Rochelle Rosenbalm be authorized to make a trust modification to the Lorraine Keehn Trust allowing for Richard Natividad to receive 60% of the estate distribution and Linda Courtney to receive 40% of the estate distribution, and any further orders the Court deems necessary.

7B Lorraine Keehn (CONS/P)

Case No. 14CEPR00474

Atty Rosenbalm, Rochelle (Pro Per – Conservator)

Atty Matlak, Steven M. (for Linda Courtney – Daughter – Petitioner)

Atty Walters, Jennifer L. (Court appointed for Proposed Conservatee)

Probate Status Hearing RE: Filing of Proof of Bond

Card frame 010/15
Cont. from 012615
Aff.Sub.Wit.
Verified
Inventory
PTC
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Notice of
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Letters
Duties/Supp
Objections
Video
Receipt
CI Report
9202
Order
Aff. Posting
Status Rpt
UCCJEA
Citation
FTB Notice

ROCHELLE ROSENBALM, family friend, was appointed as Conservator of the Person with medical consent powers and Conservator of the Estate with bond set at \$1,003,640.00 on 12/08/14.

Minute Order from hearing on 12/08/14 set this matter for a status hearing regarding filing of the bond on 01/26/15.

Letters of the Person only were issued on 01/14/15.

A Status Report was filed by Attorney Jared Marshall of Dowling Aaron Incorporated on 1-23-15. Attorney Marshall states he spoke with Ms. Rosenbalm, who is unrepresented, about the status of the bond on 1-8-15. She stated she was working diligently to obtain bond, but was having difficulty due to the amount. On 1-23-15, Ms. Rosenbalm informed him that she was still unable to obtain a bond, but was working with Jennifer Walters, courtappointed counsel for the Conservatee, to remedy the situation.

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 01/26/15 Minute Order from 01/26/15 states: Counsel requests an additional 30 days to file a Petition to Reduce the Bond.

See Page 7C for Petition for Reduction of Conservatorship Bond.

1. Need bond in the amount of \$1,003,640.00 and/or current written status report.

Reviewed by: JF

Reviewed on: 04/06/15

Updates:

Recommendation:

File 7B - Keehn

7B

7C Lorraine Keehn (CONS/P)

Case No. 14CEPR00474

Atty Rosenbalm, Rochelle (Pro Per – Conservator)

Atty Matlak, Steven M. (for Linda Courtney – Daughter – Petitioner)

Atty Walters, Jennifer L. (Court appointed for Proposed Conservatee)

Petition for Reduction of Conservatorship Bond

			JENNIFER WA
			ROCHELLE RO
Co	ont. from		with medica
	Aff.Sub.Wit.		Conservator
✓	Verified		at \$1,003,640
	Inventory		
	PTC		Petitioner sto
	Not.Cred.		consevatee requests tha
√	Notice of		\$735,953.00.
	Hrg		φ, σσ,, σσ.σσ.
√	Aff.Mail	w/	Petitioner sto
	Aff.Pub.		estate will no
	Sp.Ntc.		reduction in
	Pers.Serv.		Petitioner pr
	Conf.		the bond an
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order	Х	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

JENNIFER WALTERS, attorney for conservatee, is petitioner.

ROCHELLE ROSENBALM, family friend, was appointed as Conservator of the Person with medical consent powers and Conservator of the Estate with bond set at \$1,003,640.00 on 12/08/14.

Petitioner states that the value of the consevatee's assets is \$666,029.00 and requests that bond be reduced to \$735,953.00.

Petitioner states that the conservatee's estate will not suffer any harm by reduction in bond.

Petitioner prays for an Order reducing the bond amount to \$735,953.00.

NEEDS/PROBLEMS/COMMENTS:

- 1. The breakdown of the conservatorship estate does not include annual income. The initial petition(s) to appoint a conservator stated that the conservatee had annual income of \$34,400.00. If the conservatee still has annual income of \$34,400.00 then bond should be set at \$774,480.48.
- 2. Need Order.

Reviewed by: JF

Reviewed on: 04/06/15

Updates:

Recommendation:

File 7C - Keehn

7C

Atty

Shepard, Jeff S. (for Douglas S. Loper – Administrator – Petitioner)

Petition for Final Distribution and For Allowance of Statutory Attorneys Fees on Waivers of Accounting and Notice

O9/22/2014 as Administrator with Will Annexed with full IAEA without bond, is petitioner. Cont. from Aff.Sub.Wit. Verified PIC Not.Cred. VNot.Cred. VNot	DO	D: 07/26/2013			, son was appointed on	NEEDS/PROBLEMS/COMMENTS:
Defitioner. Defitioner.						
Cont. from Aff.Sub.Wit. ✓ Verified ✓ Inventory PTC ✓ Not.Cred. ✓ Not.Cred. ✓ Aff.Mail ✓/ Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters (97/23/2014) Dutles/Supp Objections Video Receipt CI Report ✓ 9202 ✓ Order Aff. Posting Status Rpt UCC.JEA Citation Accounting is waived Accounting is waived 18.A - \$146,522.48 POH - \$145,471.48 Administrator - Waives Attorney - \$5,397.67 (\$tatutory) Distribution, pursuant to Assignments of Interest filed 03/23/2015, is to: Douglas S. Loper - \$471.48 and 100% interest in real property Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted					AEA without bond, is	
Aff.Sub.Wit. Verified Ilan				petitioner.		
Aff. Sub. Wift. Verified Inventory PTC Notice of Hrg Administrator - Waives Attorney - \$5,397.67 (Statutory) Aff. Nail W Aff. Pub. Sp. Nic. Pers. Serv. Conf. Screen Vilea (P0/23/2014) Duties/Supp Objections Video Receipt CI Report Video Receipt Aff. Posting Status Rpt UCCJEA Citation INVerified - \$146,522.48 POH - \$145,471.48 Administrator - Waives Attorney - \$5,397.67 (Statutory) Attorney - \$5,397.67 (Statutory) Attorney - \$5,397.67 (Statutory) Distribution, pursuant to Assignments of Interest filed 03/23/2015, is to: Douglas S. Loper - \$471.48 and 100% Interest in real property Reviewed by: LV Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted	Со	nt. from		Accounting is waiv	ed	
Potential Pot		Aff.Sub.Wit.		, , , , , , , , , , , , , , , , , , , ,		
✓ Inventory PTC ✓ Not.Cred. Attorney \$5,397.67 ✓ Notice of Hrg (Statutory) ✓ Aff.Mail W/ Aff.Pub. Distribution, pursuant to Assignments of Interest filed 03/23/2015, is to: Pers.Serv. Douglas S. Loper - \$471.48 and 100% interest in real property Conf. Screen Utetres 09/23/2014 Duties/Supp Objections Video Receipt CI Report ✓ Order Aff. Posting Status Rpt Reviewed by: LV Reviewed on: 04/07/2015 UCCJEA Citation	✓	Verified			-	
Notice of Hrg Aff.Mail W/	✓	Inventory				
Notice of Hrg Statutory Status Rpt UCCJEA Citation Statutory Status Rpt UCCJEA Citation Status Rpt Citation Status Rpt Citation		PTC		Administrator –	waives	
✓ Aff.Mail W/ Aff.Pub. Sp.Ntc. Sp.Ntc. Douglas S. Loper - \$471.48 and 100% Conf. Screen ✓ Letters ✓ Letters 09/23/2014 Duties/Supp Objections Video Receipt CI Report ✓ Order Aff. Posting Status Rpt Reviewed by: LV Reviewed on: 04/07/2015 UCCJEA Updates: Recommendation: Submitted	✓	Not.Cred.		4	\$5,397.67	
Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen ✓ Letters	✓	Notice of Hrg		(Statutory)		
Sp.Ntc. Douglas S. Loper - \$471.48 and 100% interest in real property	✓	Aff.Mail	w/	,	•	
Pers.Serv. Douglas 3. Loper - 347 1.48 and 100% interest in real property Conf. Screen ✓ Letters 09/23/2014 Duties/Supp Objections Video Receipt CI Report ✓ 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Duties/Supp Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted		Aff.Pub.		Interest filed 03/23/	2015, IS TO:	
Conf. Screen ✓ Letters				Douglas S. Loper - S	\$471.48 and 100%	
✓ Letters 09/23/2014 Duties/Supp Objections Video Receipt CI Report ✓ 9202 ✓ Order Aff. Posting Reviewed by: LV Status Rpt Reviewed on: 04/07/2015 UCCJEA Updates: Citation Recommendation: Submitted				interest in real prop	erty	
Duties/Supp Objections Video Receipt CI Report ✓ 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Duties/Supp Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted		ı				
Objections Video Receipt CI Report ✓ 9202 ✓ Order Aff. Posting Status Rpt UCCJEA UCCJEA Citation Video Receipt Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted	✓	Letters 09/23/	/2014			
Video Receipt CI Report ✓ 9202 ✓ Order Aff. Posting Status Rpt UCCJEA UCCJEA Updates: Recommendation: Submitted						
Receipt CI Report ✓ 9202 Aff. Posting Status Rpt UCCJEA Citation Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted						
CI Report ✓ 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted						
✓ 9202 ✓ Order Aff. Posting Status Rpt UCCJEA Citation Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted		-				
✓ Order Aff. Posting Status Rpt UCCJEA Citation Reviewed by: LV Reviewed on: 04/07/2015 Updates: Recommendation: Submitted	1	•				
Status Rpt Reviewed on: 04/07/2015 UCCJEA Updates: Citation Recommendation: Submitted	-	Order				
Status Rpt Reviewed on: 04/07/2015 UCCJEA Updates: Citation Recommendation: Submitted		Aff. Posting				Reviewed by: LV
Citation Recommendation: Submitted						•
		UCCJEA				Updates:
File 8 - Loper		Citation				Recommendation: Submitted
	✓	FTB Notice				File 8 - Loper

Atty

Teixeira, J. Stanley (for Gloria Garza-Ulloa – Daughter – Petitioner)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 9/17/14	GLORIA GARZA-ULLOA, Daughter, is	NEEDS/PROBLEMS/COMMENTS:
		Petitioner and requests appointment as Administrator with Full IAEA without bond.	Note: The Court will set status hearings as follows:
	Aff.Sub.Wit.	All heirs waive bond.	Thurs, Sept. 10, 2015 for the filing of the Inventory and
>	Verified	Full IAEA – ok	Appraisal
	Inventory PTC	Decedent died intestate	Thurs, June 9, 2016 for the filing of the first account or petition
	Not.Cred.	Residence: Fresno	for final distribution
>	Notice of	Publication: Business Journal	
_	Hrg	Estimated value of estate:	If the proper items are on file prior to the hearing dates pursuant to local
—	Aff.Mail Aff.Pub.	Personal property: \$500.00	rules, the status hearings may come
	Sp.Ntc.	Real property: \$160,000.00,	off calendar.
	Pers.Serv.	encumbered for \$140,000.00	
	Conf.	Probate Referee: Rick Smith	
	Screen	Trobate Referee. Rick Striiii	
>	Letters		
>	Duties/Supp		
	Objections		
	Video		
	Receipt	=	
	CI Report	=	
_	9202 Order	4	
	Aff. Posting	_	Reviewed by: skc
	Status Rpt	=	Reviewed by: 3Ke
	UCCJEA	1	Updates:
	Citation		Recommendation: SUBMITTED
	FTB Notice		File 11 – Garza

11

Atty Roberts, Gregory J. (for Petitioners Judith A. Nielsen and Philip G. Nielsen)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DC	DD: 6/22/2014		JUDITH ANN NIELSEN and PHILIP GEORGE	NEEDS/PROBLEMS/COMMENTS:
	,,		NIELSEN , children, are Petitioners.	
				Item 9(a)(2)(b) of the Petition states decedent's spouse is deceased.
Co	ont. from		40 days since DOD.	Attachment 14 to the
	Aff.Sub.Wit.			Petition does not include
✓	Verified		No other proceedings.	the name and date of death of deceased spouse
✓	Inventory			pursuant to Local Rule
	PTC		\$145,000,00	7.1.1(D).
	Not.Cred.		& A - \$145,000.00	
1	Notice of			
	Hrg		Decedent died intestate.	
	Aff.Mail	N/A	Bocodom died imesiale.	
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.		Petitioners request Court determination	
	Conf.		that Decedent's 100% interest in real	
-	Screen		property located on East Yale Ave., Fresno, passes to the Petitioners at ½ interest to	
	Letters		each pursuant to intestate succession.	
	Duties/Supp		each poisoain to intestate soccession.	
	Objections			
	Video			
	Receipt			
	CI Report	I		
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 4/7/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 12 - Nielsen

Renge, Lawson K. (for Executor Betty A. Pate)
Probate Status Hearing Re: Accounting

DOD: 4-4-13	BETTY A. PATE, Daughter, was	NEEDS/PROBLEMS/COMMENTS:
DOD. 4-4-13	appointed as Executor with Full IAEA	NEEDS/TROBLEMS/COMMENTS.
	without bond on 7-24-13 and Letters	Continued from 9-19-14, 11-19-14,
	issued on 8-2-13.	1-8-15
Cont. from 091914,	At the hearing on 7-24-13, the Court set	Minute Order 1-8-15: Parties
111914, 010815	this status hearing for the filing of the first	represent they are awaiting a refund
Aff.Sub.Wit.	account or petition for final distribution.	from the Tax Board. If the accounting
Verified		is filed at least two court days prior to
Inventory	Inventory and Appraisal filed 4-24-14	the status hearing date, then no
PTC	indicates a total estate value of	appearance is necessary on 4-9-15.
Not.Cred.	\$644,428.38 consisting of real property,	
 	an Installment Note secured by deed of	As of 4-6-15, nothing further has been
Notice of	trust with assignment of rents, and a	filed.
Hrg	vehicle.	1 Nood first account or notition for
Aff.Mail	The first account or petition for final	Need first account or petition for final distribution or written status
Aff.Pub.	distribution is now due. Probate Code	report pursuant to Local Rule 7.5.
Sp.Ntc.	§ 12200.	repen persoan to recar kele 7.0.
Pers.Serv.	3 - = - 0 - 1	
Conf.	Status Report filed 9-16-14 states the	
Screen	only real property of the estate has	
Letters	been sold and the only impediment to	
Duties/Supp	closing the estate is settlement with the	
Objections	California Franchise Tax Board. The	
Video	Executrix has taken the position that no	
Receipt	taxes are due to the State from the sale	
CI Report	and is discussing said issue with the Board. Upon resolution, the estate	
9202	should be in a position to close.	
Order		
Aff. Posting	Status Report filed 11-14-14 states there	Reviewed by: skc
Status Rpt	have been continuing efforts by the	Reviewed by: SRC
	estate representative to conclude this	
UCCJEA	issue with the tax board. The attorney is	Updates:
Citation	informed and believes that once this	Recommendation:
FTB Notice	issue of tax liability is resolved, the	File 13 - Guidi
	estate should be in a position to be	
	closed.	
		12

Amador, Catherine A

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	NIEEDC/DDODLEAGC/OOAAAENITC
	NEEDS/PROBLEMS/COMMENTS:
	OFF CALENDAR
	Inventory and Appraisal filed
Aff.Sub.Wit.	12/16/15
	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: skc
Status Rpt	Reviewed on: 4/7/15
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 14 - White

- 15 Virgil & Emma H. Preheim Rev. Liv. Trust
- Case No. 14CEPR00623
- Atty Hogue, David M.; Karby, Michael G.; of H & K Inc. Attorneys at Law, Dinuba (for Petitioner Theda Preheim, Beneficiary)
- Atty Gunner, Kevin D., Law Offices of Gunner & Haught (for Mary K. Johnson, Successor Trustee)
- Atty Shahbazian, Steven L., sole practitioner (for Mary K. Johnson, Successor Trustee)

Probate Status Hearing Re: Settlement Discussions

Viro	il DOD: 10/29/2000	THEDA PREHEIM, daughter and Trust Beneficiary, filed a Petition for	NEEDS/PROBLEMS
Emma DOD: 8/5/2012		Instructions for Appraisal of Personal Property by Probate Referee or	COMMENTS:
		Personal Property Appraiser; to Determine Reasonableness of Trustee's	
-		Fees; to Determine Equitable Set-Offs; to Remove and Surcharge Trustee	
_		for Breach of Fiduciary Duty and for Failure to Treat Beneficiaries	
Со	nt. from	Impartially; and to Determine Entitlement on 7/16/2014.	
	Aff.Sub.Wit.	AAADV K JOUNSON, day abter and Suppensor Trustee of the VIDCH DDELIGIA	
	Verified	MARY K. JOHNSON, daughter and Successor Trustee of the VIRGIL PREHEIM AND EMMA H. PREHEIM REVOCABLE LIVING TRUST AGREEMENT dated	
	Inventory	10/22/1999 , filed a Response to Petition, etc. on 8/28/2015.	
	PTC		
	Not.Cred.	Minute Order dated 1/28/2015 [Judge Sanderson] states counsel requests	
	Notice of	additional time for discussions. Matter set on 4/9/2015 for status re	
	Hrg	settlement discussions.	
✓	Aff.Mail	Petitioner THEDA PREHEIM's Third and Final Status Conference Statement filed by Co-Counsel MICHAEL G. KARBY on 3/30/2015 states:	
	Aff.Pub.	This case has enjoyed a global settlement as to all issues, claims,	
	Sp.Ntc.	causes of action, and requests for Instructions from the Court raised in	
	Pers.Serv.	the Petition [emphasis in original];	
	Conf.	The global settlement further embraces and encompasses all issues,	
	Screen	counter-claims, causes of action, and requests for affirmative relief	
	Letters	sought by the Successor Trustee in her Response;	
	Duties/Supp	Also joining in the global settlement of the entire action is	
	Objections	[unrepresented third residual beneficiary,] LYLE PREHEIM, brother to	
	Video	both the Petitioner and Successor Trustee.	
	Receipt	There has been a SETTLEMENT OF ENTIRE CASE in this trust administration	
	CI Report	litigation, and a global Settlement and Release writing has been	
	9202	drafted by Trustee's attorney, Steven L. Shahbazian, and that global	
	Order	Settlement and Release writing has been executed by Petitioner and	
	Aff. Posting	 her counsel, Michael G. Karby, [emphasis in original]; The original global Settlement and Release writing was returned to Mr. 	Reviewed by:
	7	 The original global Settlement and Release writing was returned to Mr. Shahbazian's office on 3/30/2015; 	LEG
1	Status Rpt	A Dismissal With Prejudice judicial council form should be filed with the	Reviewed on:
		Court in less than 45 days [emphasis in original];	4/7/15
	UCCJEA	Petitioner requests the Court calendar a Dismissal Hearing and order	Updates:
	Citation	that upon the filing of a dismissal by Petitioner, the date would fall from	Recommendation
	FTB Notice	the Court's calendar and no party or attorney be required to appear	File 15 -
		before the Court in this case – which is only a couple steps from being	Preheim
		entirely dismissed with complete legal finality.	
		Crimery distributed with Complete legal infally.	
1	ı		

Jimenez, Augustin (Pro Per – Petitioner – Guardian) Atty Jimenez, Minerva (Pro Per – Petitioner – Guardian) Atty

Petition for Termination of Guard	dianship
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			retition for termination of Guardianship	
				NEEDS/PROBLEMS/COMMENTS:
			Please see Petition for details	Note: Petition is as to Ashley Rangel only.
Co	nt. from			Note: Petitioners filed the Petition
	Aff.Sub.Wit.			for Termination in Pro Per.
	Verified			Attorney Julia A. Brungess was
✓				the Attorney of Record for the
	Inventory			establishment of the
	PTC			guardianship. It does not
	Not.Cred.			appear that a substitution of
✓	Notice of Hrg			attorney has been filed.
1	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
✓	CI Report			
	9202			
✓	Order	_		
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 04/07/2015
	UCCJEA			Updates:
<u> </u>	Citation			Recommendation:
	FTB Notice			File 16-Rangel

Pro Per Reyes, Maria De Jesus (Pro Per Petitioner, mother)

First Amended Petition for Appointment of Probate Conservator of the Person (Prob. C. 1820, 1821, 2680-2682)

	Person (Prob. C. 1820, 1821, 2680-2682)				
		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:		
		MARIA DE JESUS REYES, mother, is Petitioner and	Court Investigator Advised Rights on 11/18/2014.		
	nt. from 010815, 2615	requests appointment as Conservator of the Person with medical consent powers.	Continued from 2/26/2015. Minute Order states examiner notes handed in open Court; matter continued for defects to be cured.		
√	Aff.Sub.Wit. Verified	Need Amended Capacity	The following issues from the last hearing remain:		
	PTC Not.Cred.	 Declaration ~Please see Petition for 	Medical Capacity Declaration filed on 2/24/2015 <u>does not</u> support the Petitioner's request for medical consent powers.		
✓	Notice of Hrg	= details~ =	Need amended Capacity Declaration due to the following defects in the Capacity Declaration filed on 2/24/2015:		
√	Aff.Mail W/	Court Investigator's Report was filed on 12/18/2014.	 Item 3 indicates that the Capacity Declaration was completed by a certified physician assistant; a licensed 		
✓	Sp.Ntc. Pers.Serv.	=	physician must complete the Capacity Declaration pursuant to Probate Code § 1890(c);		
√ √	Conf. Screen Letters	_	 Pages 2 and 3 of the Capacity Declaration are incomplete. 		
✓	Duties/Supp		 Item 7(b) is not initialed by a licensed physician as required. 		
✓	Objections Video Receipt		2. Pursuant to Probate Code §§ 2352(c) and 1822(e), need proof of service by mail of 30 days' notice together with a copy of		
✓	CI Report		the Petition for CENTRAL VALLEY REGIONAL CENTER (CVRC), or a signed waiver of		
✓	9202 Order	_	such notice by CVRC to be filed with the Court. (Note: This issue has been included in examiner notes since the hearing for the initial petition on 12/9/2014.)		
	Aff. Posting	1	Reviewed by: LEG		
	Status Rpt		Reviewed on: 4/7/15		
	UCCJEA		Updates:		
√	Citation		Recommendation:		
	FTB Notice	<u> </u>	File 17 – Reyes		
	TIB NOIICE		17 Tile 17 - Reyes		

19 Tyleea Austin (GUARD/P)

Case No. 14CEPR01135

Miramontes-Staggs, Jaclyn Ashley (Pro Per – Maternal Aunt – Petitioner) Atty Atty

Staggs, Monte (Pro Per – Maternal Uncle – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
	nt from 021915	=	Continued from 2-19-15. As of 4-6-15, nothing further has been filed.
3 >	Aff.Sub.Wit.	= = _	Need DSS report pursuant to Probate Code §1513(b).
>	Inventory PTC Not.Cred. Notice of Hrg Aff.Mail	= = = =	2. Pursuant to Proof of Service filed 2-11-15, the mother was served with Notice of Hearing, but without a copy of the petition. The Court may require further service.
\	Aff.Pub. Sp.Ntc. Pers.Serv.	- - - -	3. Notice of Hearing filed 2-11-15 includes service on someone named Jack Lilles, but it is
>	Conf. Screen Letters		unclear from the file who this person is. Is this the maternal grandfather?
>	Objections Video	=	Note: The minute order of 1-6-15 indicates that someone named Lawrence Buckner was
	Receipt ×	_	present, but it is unclear from the file who this
>	Clearances Order		person is.
	Aff. Posting Status Rpt		Reviewed by: skc Reviewed on: 4-6-15
~	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 19 - Austin

19

Gonzales, Delia (Pro Per –Petitioner – Maternal Grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

	TEMPORARY EXPIRES 04/09/2015	NEEDS/PROBLEMS/COMMENTS:
Cont. from Aff.Sub.Wit. ✓ Verified	Please petition for details	 Need Notice of Hearing. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for
Inventory PTC Not.Cred. Notice of X Hrg Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. n/a Conf.		Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
Screen ✓ Letters ✓ Duties/Supp	=	
Objections Video Receipt ✓ CI Report		
9202 ✓ Order Aff. Posting		Peviewed by: \/
Status Rpt ✓ UCCJEA		Reviewed by: LV Reviewed on: 04/07/2015 Updates:
Citation FTB Notice		Recommendation: File 20 - Sanchez

Pro Per Barsamian, Bryan Charles (Pro Per Petitioner, maternal grandfather)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			TEMPORARY GRANTED EX PARTE EXPIRES	NEEDS/PROBLEMS/COMMENTS:
			2/25/2015; extended to 4/9/2015	1 Need proof of service by
			BRYAN BARSAMIAN, maternal grandfather, is	Need proof of service by mail of the Notice of
Ę			Petitioner.	Hearing with a copy of the
Co	nt. from		- II	Petition for Appointment of
-	Aff.Sub.Wit.		Father: MATHEW MICHEL ; personally served 2/17/2015.	Guardian, or Consent to Appointment of Guardian
✓	Verified		2/1//2013.	and Waiver of Notice, or a
	Inventory		Mother: KIMBERLY BARSAMIAN; personally	Declaration of Due
	PTC		served 2/18/2015.	Diligence, for:
	Not.Cred.		Paternal grandfather: Deceased	 Sue Michel, paternal grandmother.
✓	Notice of		Paternal grandmother: Sue Michel	granamom a r.
-	Hrg Aff.Mail	Χ	3 - 1 - 1 - 1 - 1 - 1 - 1 - 1	
	Aff.Pub.	^	Maternal grandmother: Deceased	
-	Sp.Ntc.		~Please see Petition for details~	
1	Pers.Serv.		ricase see remon for defails	
			Court Investigator's Popert was filed on	
√	Conf. Screen		Court Investigator's Report was filed on 4/2/2015.	
√	Letters			
√	Duties/Supp			
	Objections			
	Video			
	Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 4/7/15
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 21 - Michel

22 Atty

Ma, Peggy Piedad (Pro Per – Maternal Grandmother – Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			see pennon for defails.	NEEDS/PROBLEMS/COMMENTS.
				1. Luis Aranda, father of Luis
				Jr., was personally served
				on 4/6/15, which is only
	Aff Code MCL			three court days prior to
<u> </u>	Aff.Sub.Wit.			the hearing. (Probate
_	Verified			Code §2250(e) requires five court days' notice.
	Inventory			live coon days nonce.
	PTC			
	Not.Cred.			
~	Notice of			
	Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
~	Pers.Serv.	W		
~	Conf.			
	Screen			
~	Letters			
~	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 4/7/15
~	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 22 – Aranda & Hueso

Puryear, Ef (Pro Per – Step-father – Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order		Note: Petitioner indicates his address is on North Ashlan; however, Ashlan runs east/west. Need clarification: Is Petitioner's address actually on West Ashlan? (West Ashlan would correspond to the zip code 93722.) 1. If diligence is not found, the Court may require notice to the father pursuant to Probate Code §2250(e) or further diligence. 2. Petitioner does not provide the names of the paternal or maternal grandparents, but did file Notice of Hearing forms indicating personal service for this hearing on Brandon Williams and Delores Hullon. Are these the maternal grandparents?
	Aff. Posting]	Reviewed by: skc
	Status Rpt		Reviewed on: 4/7/15
~	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 23 - Hudson

Citation FTB Notice

Perez, Jacquelyn (pro per – paternal cousin/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

TEMPORARY EXPIRES 04/09/15 JACQUELYN PEREZ, paternal cousin, is Petitioner. Cont. from 020915, Father: JOHNNY HERNANDEZ - Consent 033015 & Waiver of Notice filed 12/09/14 Aff.Sub.Wit. Mother: LESLIE SANCHEZ - Consent & Verified Waiver of Notice filed 12/09/14 Inventory PTC Paternal grandfather: BENNY Not.Cred. HERNANDEZ - deceased Notice of Paternal grandmother: JUANITA Hrg HERNANDEZ - deceased Aff.Mail Х Maternal grandfather: MR. SANCHEZ -Aff.Pub. Consent & Waiver of Notice filed on Sp.Ntc. 12/09/14 Pers.Serv. n/a Maternal grandmother: ELIZABETH Conf. ESQUEDA - Consent & Waiver of Notice Screen filed 12/09/14 Letters **Petitioner states** [see Petition for details]. **Duties/Supp Objections** Court Investigator Charlotte Bien filed a Video report on 01/26/15. Receipt CI Report 9202 Order Aff. Posting Status Rpt **UCCJEA**

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 03/30/15

Minute Order from 03/30/15 states:
Parties represent that there are no siblings over the age of 12, and that the paternal grandparents are deceased.
Leslie Sanchez, mother, contacted the Clerk to advise that she was in D96 this morning. The matter is continued to allow her to appear. The Court orders visitation for Elizabeth Esqueda on Tuesdays and Thursdays from 10:30am to 12:30pm, to be mutually agreed as to pick-up and delivery. The Court directs the Clerk to mail a copy of the minute order to Ms. Sanchez.

- 1. Need Notice of Hearing.
- Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for:
 a. Paternal grandparents

b. Any siblings age 12 and over

Reviewed by: JF

Reviewed on: 04/06/15

Updates:

Recommendation:

File 24 - Hernandez

24

Esraelian, Robyn L. (for Barbara J. Najimian – Surviving Spouse – Petitioner)
Petition to Determine Succession to Real Property (Prob. C. 13151)

	retition to Determine Succession to Real Property (Prob. C. 13151)				
DO	D: 11-25-13		BARBARA J. NAJIMIAN, Surviving	NE	EDS/PROBLEMS/COMMENTS:
			Spouse, is Petitioner.		
					nute Order 4-2-15: Counsel has the
			40 days since DOD		ginal will and the Inventory and
6-	n fra ma 04001 F				praisal; she is directed to bring
<u> </u>	nt from 040215	1	No other proceedings	the	em back to court on 4/9/15.
	Aff.Sub.Wit.				
~	Verified		I&A: \$33,500.00 (various real property		ote: As of 4/6/15, nothing further
~	Inventory		interests)	ha	s been filed.
	PTC		Will dated 4-24-97 devises the entire	1	The original will has not been
	Not.Cred.		estate to Petitioner.	''	deposited pursuant to Probate
~	Notice of				Code §8200. Need original will.
	Hrg		Petitioner requests Court determination		•
~	Aff.Mail	W	that the decedent's various interests in	2.	Need original Inventory and
	Aff.Pub.		real property passes to her pursuant to the Decedent's will.		Appraisal. The document
	Sp.Ntc.		THE DECEMENT'S WIII.		attached to the petition is a copy.
	Pers.Serv.				
	Conf.				<u>ote</u> : Attorney is reminded to tumble
	Screen				ouble-sided forms pursuant to Cal.
	Letters				le of Court 2.134(b), and to always
	Duties/Supp			-	ovide a signature line on the order lowing the last attachment
	Objections				rsuant to Local Rule 7.6.1.B.
	Video			"	
	Receipt				
	CI Report				
	9202				
~	Order				
	Aff. Posting			Re	viewed by: skc
	Status Rpt			Re	viewed on: 4-6-15
	UCCJEA			Up	dates:
	Citation			Re	commendation:
	FTB Notice			File	e 25 - Najimian

25

Jaech, Jeffrey A. (for Jennifer A. Williamson – sister/Petitioner)

Probate Status Hearing Re: Filing Inventory & Appraisal

DOD: 9-22-14	JENNIFER WILLIAMSON, sister, was	NEEDS/PROBLEMS/COMMENTS:
505.7 22 14	appointed Executor with Full IAEA	NEEDS, I ROBLEMS, COMMENTS.
	without bond pursuant to Order for	Need Inventory and Appraisal
	Probate filed 11/7/14. Letters issued on	pursuant to Probate Code §8800.
	11/10/14.	
	=	
Aff.Sub.Wit.	The Court set this status hearing for the	
Verified	filing of the Inventory and Appraisla	
Inventory	pursuant to Notice of Setting Status Hearing filed 1/22/15.	
PTC		
Not.Cred.	Status Report filed 4/3/15 states the	
Notice of	assets of the estate include three	
Hrg	partnerships, a sole proprietorship, and	
Aff.Mail	real property in three different counties.	
Aff.Pub.	Petitioner has been assisting her	
Sp.Ntc.	attorneys in gathering thedocumentation needed for the	
Pers.Serv.	probate referee to value the assets. The	
Conf.	Inventory and Appraisal was mailed to	
Screen	the Probate Referee on 3/26/15. A	
Letters	continuance of three months is	
Duties/Supp	requested to allow the Probate Referee	
Objections	to complete his valuation and return the form to the attorney.	
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt	<u> </u>	Reviewed on: 4/7/15
UCCJEA		Updates:
Citation	_	Recommendation:
FTB Notice		File 26 - Williamson

4 Edward Uribe Medina (Estate)

Case No. 12CEPR00470

Atty Perez, Holley H., of Perez, Williams, Medina & Rodriguez (for Petitioner Susan K. Medina)

Amended (1) First and Final Report of Executor, (2) Waiver of Accounting and (3) Petition for Distribution

DC	DD: 2/25/2011	SUSAN K. MEDINA , daughter and Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
Cont. from 121614, 022515 Aff.Sub.Wit.		- \$173,000.00 POH - \$173,000.00 (no cash)	
✓	Verified	Executor — waives	
✓	Inventory	Attornov	
✓	PTC	Attorney — \$1,585.00 (less than \$6,190.00 statutory fee, pursuant	
✓	Not.Cred.	to agreement between Petitioner and	
✓	Notice of Hrg	Petitioner's attorney) Costs — \$1,441.00	
✓	Aff.Mail ^w	(filing fee, probate referee, publication,	
	Aff.Pub.	certified copies, recording fees)	
	Sp.Ntc.	Distribution pursuant to Decedent's Will is to:	
	Pers.Serv.	ALDEDT I AAEDINIA OEG interestinanti	
	Conf. Screen	ALBERT J. MEDINA – 25% interest in real property in Sanger, miscellaneous items	
	Letters 081412	of personal property, clothing and	
	Duties/Supp	jewelry; • RICHARD E. MEDINA – 25% interest in real	
	Objections	property in Sanger, miscellaneous items	
	Video Receipt	of personal property, clothing and jewelry;	
	CI Report	DAVID M. MEDINA – 25% interest in real	
✓	9202	property in Sanger, miscellaneous items of personal property, clothing and	
✓	Order	jewelry;	
	Aff. Posting	SUSAN K. MEDINA – 25% interest in real	Reviewed by: LEG
	Status Rpt	property in Sanger, miscellaneous items of personal property, clothing and	Reviewed on: 4/7/15
	UCCJEA	jewelry.	Updates:
	Citation FTB Notice	-	Recommendation: SUBMITTED File 4 - Medina
✓	1 10 HOUCE		THE 4- MEGHIG